

Last Updated: 10/02/2020

# Contact Tracing Supervisor

## Quick Reference Guide



Missouri's Advanced Contact Tracing System

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Missouri's Advanced Contact Tracing System



# Introduction

- Welcome to the **Missouri Advanced Contact Tracing System (MO ACTS)** powered by Salesforce!
- Your role as a Contact Tracer Supervisor enables our team of Contact Tracers to gather information about the transmission of COVID-19, help the people that have been exposed, and ultimately contain this deadly disease.
- Included within this guide are a set of step by step job aids for key supervisor processes and activities in MO ACTS.
- Thank you for being part of the solution. We couldn't do this without you!

# Job Aid

- Support Tips for Logging In to MO ACTS and Amazon Connect



# Log In to MO ACTS and Amazon Connect

## MO ACTS REQUIREMENTS

Make sure the system requirements below are met by your computer:

- **Operating System:** Windows 7 or MacOS El Capitan or newer
- **Strong Internet Connection**
- **Google Chrome as your web browser** (Firefox is an alternative browser option)  
*Need help setting Chrome as a default browser? Reference [this helpful article](#).*

## LOG IN

- Use the [MO ACTS Log In Guide](#) to access your account, and help others troubleshoot first-time and day-to-day log in.

## MO ACTS SUPPORT TIPS

Here are some support tips to apply when troubleshooting MO ACTS access issues:

### ☐ Check the user's **browser**

- MO ACTS will work best in a **Google Chrome** browser.
- If Chrome is not an option, users should use **Firefox**

### ☐ Check the user's **URL**

- The URL for the production environment of MO ACTS is <https://mact.my.salesforce.com/>
- The URL could include other words (like lightning), but should only have **mact** – not macttrng or other combinations
- For instructions on how to save this link as a favorite, click [here](#)

### ☐ Check the user's **log in credentials**

- The user ID will follow the format **EmailAddress.mact**
- If the user is not sure what their user ID is, they should look for an email from **support@salesforce.com**

*Continued on next page*

# Support Tips

## AMAZON CONNECT SUPPORT TIPS

Here are some support tips to apply when troubleshooting Amazon Connect access issues:

❑ Check the user's **browser**

- Your Amazon Connect softphone will work best in a **Google Chrome** browser.
- If Chrome is not an option, users should use **Firefox**

❑ Confirm the user has **plugged their headset into the computer**

- A red error indicating that the browser cannot access the microphone will appear until the browser is given permission to access the microphone
- Plugging a headset in to the same device the user is accessing MO ACTS from will trigger the browser to request permission to access the microphone – at which point, the user should select **allow permission** in order to place outbound calls from MO ACTS through Amazon Connect

❑ Confirm that the pop-ups are **enabled** (click [here](#) for instructions)

- Make sure these two URLs are listed to [Allow Pop-Ups](#)  
**MO ACTS:** <https://moct.my.salesforce.com/>  
**Amazon Connect:** <https://moprodconnect.awsapps.com/connect/login>

❑ [Clear the user's cache](#) in case they formerly blocked pop-ups or disallowed the microphone access

Refer to [this article](#) for more details on using your microphone in Chrome.

# Job Aid

## Contact Case Quick Facts



Missouri's Advanced Contact Tracing System

# Contact Case Quick Facts

## Contact Case Visibility

Contact outreach visibility for records in MO ACTS has been set up as follows:

- **LPHA Contact tracers and supervisors** can see and edit all cases assigned to their jurisdiction's queue or a user in their jurisdiction(s)
  - If a user is assigned to more than one jurisdiction (i.e. the jurisdiction has data sharing agreement with another jurisdiction) they will have the ability to see multiple jurisdiction groups and see, Contact to COVID-19 case records for each jurisdiction group in which they are assigned. Contact Tracers will be able to view their primary jurisdiction in a list view as well as view additional secondary jurisdictions they're assigned to in separate list views (pre-pended with 'Cross Jurisdiction').
- **LPHA Contact Tracers and supervisors** won't be able to see any cases outside of their assigned jurisdiction(s)
- **DHSS users** will have access to edit all cases in all jurisdictions

## Contact case status definitions

- A contact case record in MO ACTS has a **Status** to represent the stage of outreach in the contact tracing process.
- Every contact case record in MO ACTS will be placed in one of the following Statuses:



The definition of each status includes:

- **Awaiting Outreach:** A contact case that has not yet had any attempted outreach completed and may be owned by a queue or user.
- **Outreach Underway:** A contact case that may be owned by a Contact Tracer or Queue and where initial outreach calls or attempts have taken place.
- **Monitoring & Support:** A contact case for which an initial outreach call and assessment has been successfully completed. The quarantine and monitoring process is in progress.
- **Closed:** A contact case that has been successfully monitored and released from quarantine.



# Job Aid

How to Use Existing Contact Case List Views,  
Queues & Assignment



Missouri's Advanced Contact Tracing System

# How to Use Existing Contact Case List Views, Queues & Assignment

## Search for a case

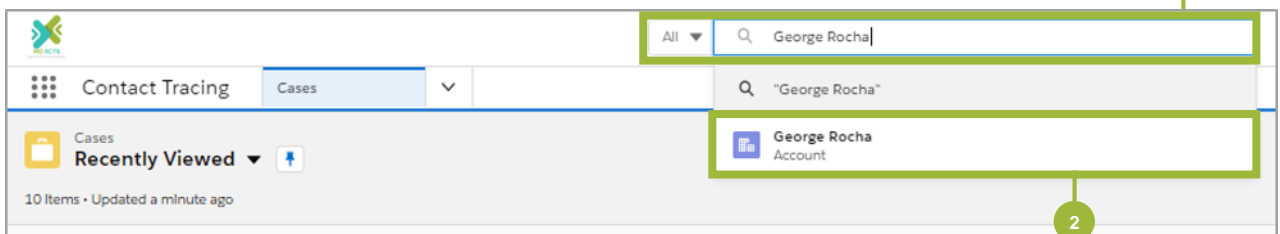
MO ACTS users are able to search for a case using this functionality and are able to view the searched fields in Global Search Results.

Options to search for a specific contact case in MO ACTS include:

- **Global Search**
- **Contact Case tab - List Views & Queues**

### Global Search

1. Enter the contact case you are searching for in the **Global Search bar**. You may search by any field on the record (e.g., Contact Case Name, EpiTrax CMR Number).
2. Hit **enter** to view results or select the contact case to view the record.



### Contact Case tab - List Views & Queues

- **Definitions:**
- **List views** allow you to view and filter information for contact cases, which are owned by MO ACTS users (e.g., contact tracers).
- **Queues** contain contact cases which do not yet have an owner and must be accepted.

# How to Use Existing Contact Case List Views, Queues & Assignment

## Search for a case

### Contact Case tab - List Views & Queues (Continued)

View available list views and queues by following the steps below:

1. Select the Contact **Case's tab**.
2. Click on the **dropdown arrow** next to the current list view title to view all available list views and queues.
3. All existing list views and queues are displayed.

The screenshot displays the 'Contact Tracing' application interface. At the top, there is a search bar labeled 'Search Cases and more...'. Below this, the 'Cases' tab is selected, indicated by a green box and a circled '1'. A dropdown arrow next to the 'Cases' tab is highlighted with a green box and a circled '2'. The dropdown menu is open, showing a search bar and a list of 'LIST VIEWS'. The 'Recently Viewed (Pinned list)' option is selected, indicated by a checkmark and a green box. The 'Recently Viewed Cases' option is also visible. The main content area shows a table of cases with columns for 'Last Exposure Date' and 'Time Opened'. The table contains multiple rows of data, with the first row showing '6/29/2020' and '6/29/2020, 3:41 PM'. A circled '3' highlights the dropdown arrow next to the 'Time Opened' column header.

Last Exposure Date	Time Opened
6/29/2020	6/29/2020, 3:41 PM
10/29/2012	6/29/2020, 10:13 AM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM
6/29/2020	6/29/2020, 3:41 PM

# How to Use Existing Contact Case List Views, Queues & Assignment

## List view/queue overview & definition

Included below is a table with all the existing views and their corresponding descriptions:

- **Top Views**

Queue / List view	Description
<b>Contact Tracing Outreach Queue</b>	Displays all contact cases in MO ACTS, owned by the Contact Tracing Outreach Queue (not yet owned by a Contact Tracer), and that are set to <u>Awaiting Outreach</u> status.
<b>Contacts Awaiting Outreach</b>	Displays <u>all</u> contact cases in MO ACTS that are set to the <u>Awaiting Outreach</u> status, including those owned by Contact Tracers who have attempted outreach, however, have not yet completed the first outreach call.
<b>Contacts Outreach Underway</b>	Displays <u>all</u> contact cases in MO ACTS that are set to the <u>Outreach Underway</u> status.
<b>Contacts Monitoring &amp; Support</b>	Displays <u>all</u> contact cases in MO ACTS that are set to <u>Monitoring &amp; Support</u> status.

- **Additional Views**

Queue / List view	Description
<b>Recently Viewed or Recently Viewed Cases</b>	Displays all contact cases recently viewed by you.
<b>All Open Cases in My Jurisdiction</b>	Displays <u>all</u> contact cases in <u>all stages</u> (Awaiting Outreach, Outreach Underway, Monitoring and Support) and <u>owned by anyone in your jurisdiction</u> .
<b>Contacts Closed</b>	Displays <u>all</u> contact cases in MO ACTS that are set to the <u>Closed status</u> .
<b>My Contacts</b>	Displays any cases where you are set as the Case Owner across all statuses.



**Note:** Contact Tracers will be able to view their primary jurisdiction as well as additional jurisdictions they're assigned to (e.g. jurisdictions with data sharing agreement) in separate list views pre-pended with 'Cross Jurisdiction'.

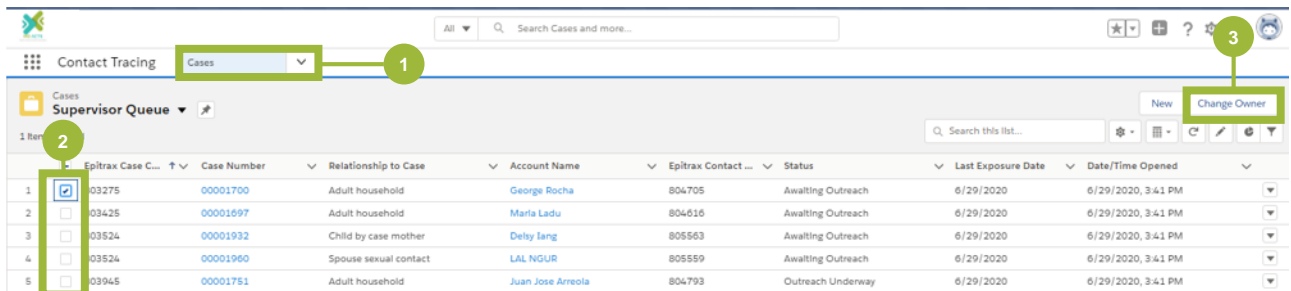
# How to Use Existing Contact Case List Views, Queues & Assignment

## Re-assign a contact case to another queue or user

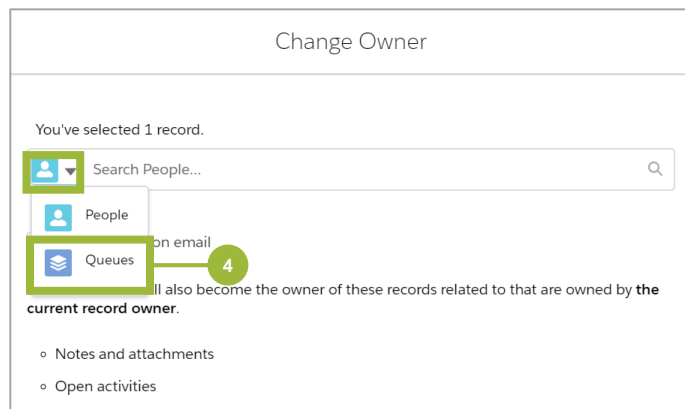
At times, you may need to re-assign a contact case to be a different user or queue.

### Re-assign to Another Queue

1. From the Contact **Case tab**, select the **list view or queue** you wish you view.
2. Click the **checkmark(s)** next to the box(es) of the contact case(s) you wish to re-assign to a different user or queue.
3. Click **Change Owner**.



4. A new window will open. Select **Queues** from the dropdown.



# How to Use Existing Contact Case List Views, Queues & Assignment

## Re-assign a contact case to another queue or user

### Re-assign to Another Queue (Continued)

5. Search for the **Queue** you wish to transfer the contact case to in the field and select the **Queue Name** from the dropdown.
6. Click **Submit**.

Change Owner

You've selected 1 record.

contact

Search "contact" in Queues

Contact Tracing Outreach Queue

current record owner.

- Notes and attachments
- Open activities

Cancel Submit

7. A message appears to indicate the case ownership has successfully updated.



# How to Use Existing Contact Case List Views, Queues & Assignment

## Re-assign a contact case to another queue or user

### Re-assign to Another User

1. From the Contact **Case tab**, select the **list view or queue** you wish you view.
2. Click the **checkmark(s)** next to the box(es) of the contact case(s) you wish to re-assign to a different user or queue.
3. Click **Change Owner**.

4. Type the **Username** you wish to transfer the contact case to in the **Search** bar.

The 'Change Owner' dialog box shows a message 'You've selected 1 record.' Below this is a search bar labeled 'Search People...'. A green box highlights this search bar. Below the search bar is a checkbox labeled 'Send notification email'. At the bottom, there's a note: 'The new owner will also become the owner of these records related to that are owned by the current record owner.' followed by two bullet points: 'Notes and attachments' and 'Open activities'.

Change Owner

You've selected 1 record.

☐ Send notification email

The new owner will also become the owner of these records related to that are owned by the current record owner.

- Notes and attachments
- Open activities

# How to Use Existing Contact Case List Views, Queues & Assignment

## Re-assign a contact case to another queue or user

### Re-assign to Another User (Continued)

5. Select the correct **Username**.
6. Click **Submit**.

Change Owner

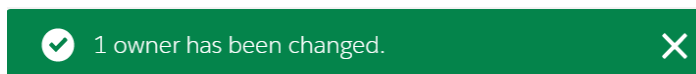
You've selected 1 record.

- ☒ Sophia Nelson
- ☐ Sophia Smith

current record owner.

- ☐ Notes and attachments
- ☐ Open activities

7. A message appears to indicate the case ownership has successfully updated.





# Bulk Contact Case Actions

## Bulk Re-assign a Contact Case to another queue or user

### Re-assign Contact Cases in Bulk

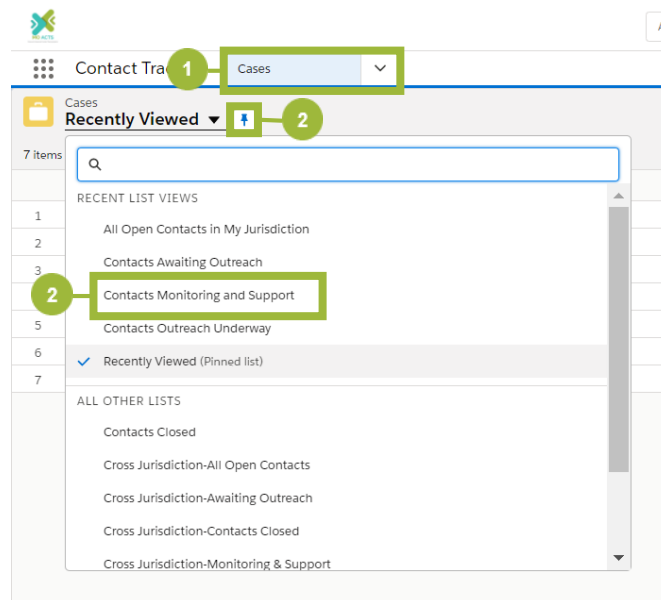
Contact Tracers can mass reassign Contact to COVID-19 cases. This will allow a contact tracer to reassign their contact cases to someone else, a supervisor to assign contact cases to individual contact tracers, or a contact tracer to reassign contact cases to a different jurisdiction's queue. This functionality allows you to reassign up to 200 cases at a time.



**Note:** If a user is actively in the Contact to COVID-19 Case record making updates and their case is reassigned before they save their changes, they will no longer have access to the case and they will get an error message when they try to save their changes.

Below are the steps to reassign a case in bulk.

1. From the home screen, navigate to the **Cases tab**.
2. From the **Cases tab**, click the drop-down arrow and select an appropriate list view (e.g. Monitoring and Support).

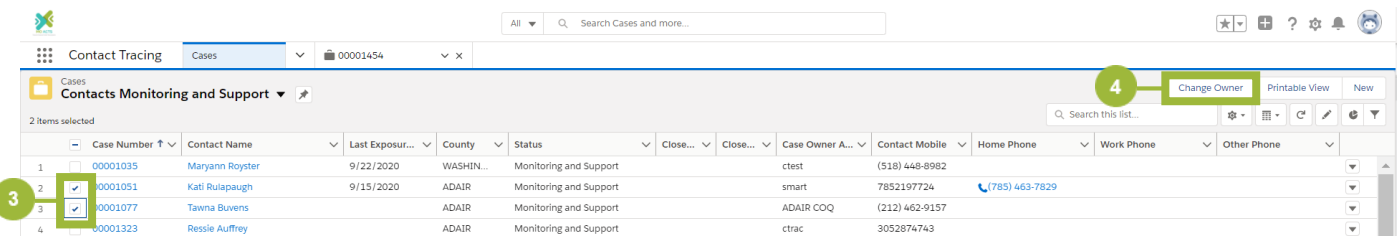


# Bulk Contact Case Actions

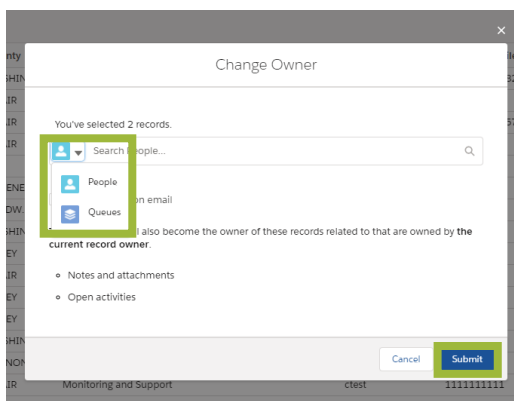
## Bulk Re-assign a Contact Case to another queue or user

### Re-assign Contact Cases in Bulk (continued)

3. Once the list view opens, select the cases you wish to reassign by clicking to the left of the case number in the checkbox.
4. Click the **Change Owner** button.



5. You can now either choose to select a **Queue (jurisdiction)** or a **Person** to reassign the case to.
6. Click **Submit**.



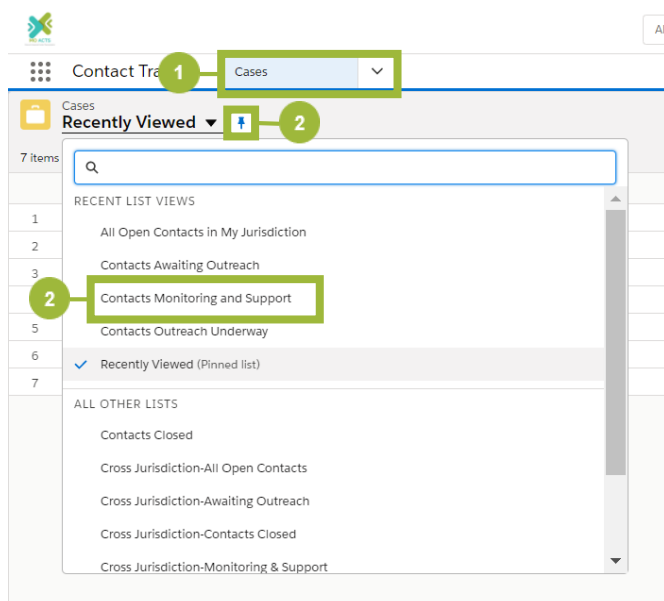
# Bulk Contact Case Actions

## Closing Cases in Bulk

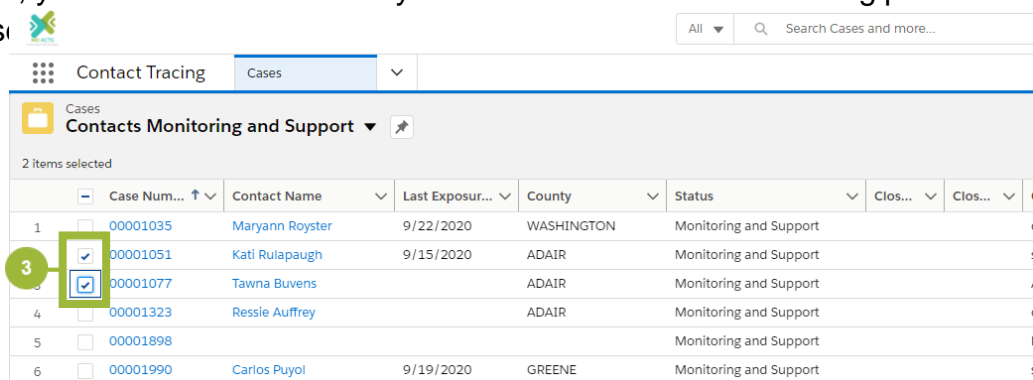
### Close Contact Cases in Bulk

Contact Tracers now have the ability to close cases in bulk. This new functionality allows for you to close up to 200 cases at a time. Below are the steps to close a case in bulk.

1. From the home screen, navigate to the Cases tab.
2. From the cases tab, click the drop-down arrow and select an appropriate queue (e.g. Monitoring and Support).



3. Now, you will see all the cases you own that are in the monitoring phase. Select the cases you want to close in bulk.



# Bulk Contact Case Actions

## Closing Cases in Bulk

### Close Contact Cases in Bulk (continued)

- Next, under **Status** update a case to **Closed** from the dropdown, then click the checkbox for **Update selected items** to mass update every selected case status to 'Closed.'
- Click **Apply**.

2 items selected

	Case Number ↑	Contact Name	Last Exposur...	County	Status	Close...	Close...
1	<input type="checkbox"/> 00001035	Maryann Royster	9/22/2020	WASHIN...	Monitoring and Support		
2	<input checked="" type="checkbox"/> 00001051	Kati Rulapaugh	9/15/2020	ADAIR	Closed		
3	<input checked="" type="checkbox"/> 00001077	Tawna Buvens		ADAIR			
4	<input type="checkbox"/> 00001323	Ressie Auffrey		ADAIR			
5	<input type="checkbox"/> 00001898						
6	<input type="checkbox"/> 00001990	Carlos Puyol	9/19/2020	GREENE	Monitoring and Support		

Update 2 selected items

Cancel Apply

- Lastly, choose the **Closed Reason**. Contact Tracers have the option to choose individual Closed Reasons or, similar to Step 4, you can select the checkbox to mass update the selected items with the same Closed Reason. Click **Apply**.

2 items selected

	Case Number ↑	Contact Name	Last Exposur...	County	Status	Close...	Close...	Case Owner A...	Conti
1	<input type="checkbox"/> 00001035	Maryann Royster	9/22/2020	WASHIN...	Monitoring and Support			ctest	(518)
2	<input checked="" type="checkbox"/> 00001051	Kati Rulapaugh	9/15/2020	ADAIR	Closed				52
3	<input checked="" type="checkbox"/> 00001077	Tawna Buvens		ADAIR	Closed				12
4	<input type="checkbox"/> 00001323	Ressie Auffrey		ADAIR	Monitoring and Support				352
5	<input type="checkbox"/> 00001898				Monitoring and Support				
6	<input type="checkbox"/> 00001990	Carlos Puyol	9/19/2020	GREENE	Monitoring and Support			smart	3158
7	<input type="checkbox"/> 00001003	Doherty Carline	9/23/2020	CAI FM	Monitoring and Support			emart	3158

Update 2 selected items

Cancel Apply

# Bulk Contact Case Actions

## Closing Cases in Bulk

### Close Contact Cases in Bulk (continued)

7. Once all your changes are complete, click **Save**. Now, all the cases you just closed will be in the **Contacts Closed List View**.

The screenshot shows the 'Contact Tracing' application interface. At the top, there's a search bar and a dropdown menu set to 'All'. Below this, the 'Cases' tab is active, showing a list of cases. The table has columns for Case Number, Contact Name, Last Exposure Date, County, Status, and Close buttons. Two cases are selected (checked): Case 2 (Kati Rulapaugh) and Case 3 (Tawna Buvens). Both have a status of 'Closed'. A green circle with the number 7 is overlaid on the 'Save' button at the bottom right.

	Case Number	Contact Name	Last Exposur...	County	Status	Close...	Close...	Car
1	<input type="checkbox"/> 00001035	Maryann Royster	9/22/2020	WASHIN...	Monitoring and Support			cte
2	<input checked="" type="checkbox"/> 00001051	Kati Rulapaugh	9/15/2020	ADAIR	Closed	Quara...		sm
3	<input checked="" type="checkbox"/> 00001077	Tawna Buvens		ADAIR	Closed	Quara...		AD
4	<input type="checkbox"/> 00001323	Ressie Auffrey		ADAIR	Monitoring and Support			ctr
5	<input type="checkbox"/> 00001898				Monitoring and Support			KAI
6	<input type="checkbox"/> 00001990	Carlos Puyol	9/19/2020	GREENE	Monitoring and Support			sm
7	<input type="checkbox"/> 00001993	Roberto Carlos	9/23/2020	CALDW...	Monitoring and Support			sm
8	<input type="checkbox"/> 00002086	Carlos Puyol		WASHIN...	Monitoring and Support			cte
9	<input type="checkbox"/> 00002098	Geo M George	9/28/2020	TANEY	Monitoring and Support			cte
10	<input type="checkbox"/> 00002105	Roronoa Zoro		ADAIR	Monitoring and Support			cte

At the bottom, there are 'Cancel' and 'Save' buttons. A green circle with the number 7 is overlaid on the 'Save' button.

# Job Aid

## How to Create New Contact Case List Views



Missouri's Advanced Contact Tracing System

# How to Create New Contact Case List Views

## Create new / custom contact case list views

If the default list views do not show the fields that you personally would like to see, you have the option to create a custom list view.

1. Navigate to the **Cases** tab.
2. Click the **Settings** icon.
3. Select **New**, to create a completely new list view or **Clone**, to replicate an existing list view to then make updates. The Clone functionality can be the preferred way to create a new list view as it provides a starting point for a user to manipulate.


The screenshot shows the EpiTrax Contact Tracing interface. At the top, there is a 'Contact Tracing' header with a 'Cases' dropdown menu. Below this, there is a 'Contact Tracing Outreach Queue' section. A table of cases is displayed, with columns for 'EpiTrax Case C...', 'Case Number', 'Relationship to Case', 'Account Name', 'EpiTrax Contact ...', 'Status', 'Last Exposed', and 'Opened'. A 'LIST VIEW CONTROLS' menu is open, showing options like 'New', 'Clone', 'Rename', 'Sharing Settings', 'Edit List Filters', 'Select Fields to Display', 'Delete', and 'Reset Column Widths'. The 'New' and 'Clone' options are highlighted.

	EpiTrax Case C...	Case Number	Relationship to Case	Account Name	EpiTrax Contact ...	Status	Last Exposed	Opened
1	803524	00001960	Spouse sexual contact	LAL NGUR	805559	Awaiting Outreach	6/29/2020	3:41 PM
2	803524	00001932	Child by case mother	Daisy Tang	805563	Awaiting Outreach	6/29/2020	3:41 PM
3	803425	00001697	Adult household	Maria Ladu	804616	Awaiting Outreach	6/29/2020	3:41 PM
4	803275	00001791	Adult household	Giovanni Rocha	804702	Awaiting Outreach	6/29/2020	3:41 PM
5	803275	00001700	Adult household	George Rocha	804705	Awaiting Outreach	6/29/2020	3:41 PM
6	803136	00001961	Child by case mother	Meme Lay	805602	Awaiting Outreach	6/29/2020	3:41 PM
7	802970	00001718	Child by case mother	Erick Villa	804658	Awaiting Outreach	6/29/2020	3:41 PM
8	802970	00001696	Spouse sexual contact	Jose Martin Ville Gutierrez	804651	Awaiting Outreach	6/29/2020	3:41 PM
9	801128	00001959		Jaurez Allison	805424	Awaiting Outreach	6/29/2020	3:41 PM

# How to Create New Contact Case List Views

## Create new / custom contact case list views

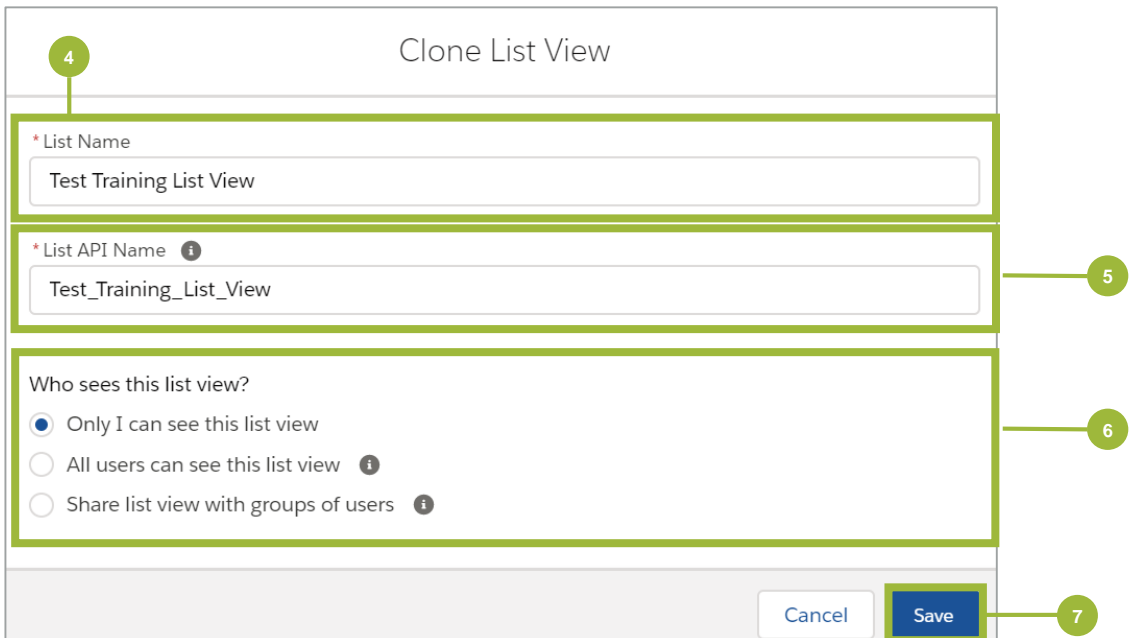
4. Enter **List Name** for the new or cloned list view.
5. Enter the **List API Name**.

 **Note:** It must begin with a letter and use only alphanumeric characters and underscores. The name can't end with an underscore or contain two consecutive underscores.

6. Select the **Radio button** to confirm who should be able to view this new or cloned list view.
  - **Only I can see this list view:** The new/cloned list view is visible only by you.
  - **All users can see this list view:** The new/cloned list view is visible for all MO ACTS users (not recommended).
  - **Share list view with groups of users:** The new/cloned list view is visible to specific user groups/ MO ACTS profiles.

When creating new or cloned list views, it is best practice to keep the access to **Only I can see this list view**, and then to expand access once the view has been reviewed and confirmed. Typically, you will want to keep access to: **Only I can see this list view** OR **Share list view with groups of users**.

7. Click **Save**.



The screenshot shows a form titled "Clone List View". It contains three main input sections, each highlighted with a green border and a numbered callout:

- Callout 4:** Points to the "List Name" field, which contains the text "Test Training List View".
- Callout 5:** Points to the "List API Name" field, which contains the text "Test\_Training\_List\_View".
- Callout 6:** Points to the "Who sees this list view?" section, which contains three radio button options:
  - ☒ Only I can see this list view
  - ☐ All users can see this list view
  - ☐ Share list view with groups of users
- Callout 7:** Points to the "Save" button at the bottom right of the form.



# How to Create New Contact Case List Views

## Create a new / custom contact case list views

7. The new or cloned list view is displayed.
8. Click the **Settings** icon.
9. Click **Select Fields to Display** to add or remove the columns that are visible on the list view.

The screenshot shows the 'Contact Tracing' application interface. At the top, there's a search bar and a 'Cases' tab. Below the tab, the current view is 'Test Training List View'. A table of cases is displayed with columns: Epitrac, Case Number, Relationship to Case, Account Name, Epitrac C..., Status, Last Exposur..., and Date/Time Opened. A settings menu is open, showing options like New, Clone, Rename, Sharing Settings, Edit List Filters, Select Fields to Display, and Delete. The 'Select Fields to Display' option is highlighted with a green box and a green circle with the number 9. A green circle with the number 8 points to the settings icon in the top right corner of the table.

	Epitrac ...	Case Number	Relationship to Case	Account Name	Epitrac C...	Status	Last Exposur...	Date/Time Opened
1	<input type="checkbox"/>	803524	00001932	Child by case mother	Dely Iang	805563	Awaiting Outreach	6/29/2020, 3:41 PM
2	<input type="checkbox"/>	803524	00001960	Spouse sexual contact	LAL NGUR	805559	Awaiting Outreach	6/29/2020, 3:41 PM
3	<input type="checkbox"/>	803425	00001697	Adult household	Maria Ladu	804616	Awaiting Outreach	6/29/2020, 3:41 PM
4	<input type="checkbox"/>	803275	00001700	Adult household	George Rocha	804705	Awaiting Outreach	6/29/2020, 3:41 PM
5	<input type="checkbox"/>	803275	00001791	Adult household	Giovanni Rocha	804702	Awaiting Outreach	6/29/2020, 3:41 PM
6	<input type="checkbox"/>	803136	00001961	Child by case mother	Memee Lay	805602	Awaiting Outreach	6/29/2020, 3:41 PM
7	<input type="checkbox"/>	802970	00001696	Spouse sexual contact	Jose Martin Villie Gutierrez	804651	Awaiting Outreach	6/29/2020, 3:41 PM
8	<input type="checkbox"/>	802970	00001718	Child by case mother	Erick Villa	804658	Awaiting Outreach	6/29/2020, 3:41 PM
9	<input type="checkbox"/>	801128	00001950		Jose Jaurez	805435	Awaiting Outreach	6/29/2020, 3:41 PM
10	<input type="checkbox"/>	801128	00001951		daniel Juarez	805439	Awaiting Outreach	6/29/2020, 3:41 PM

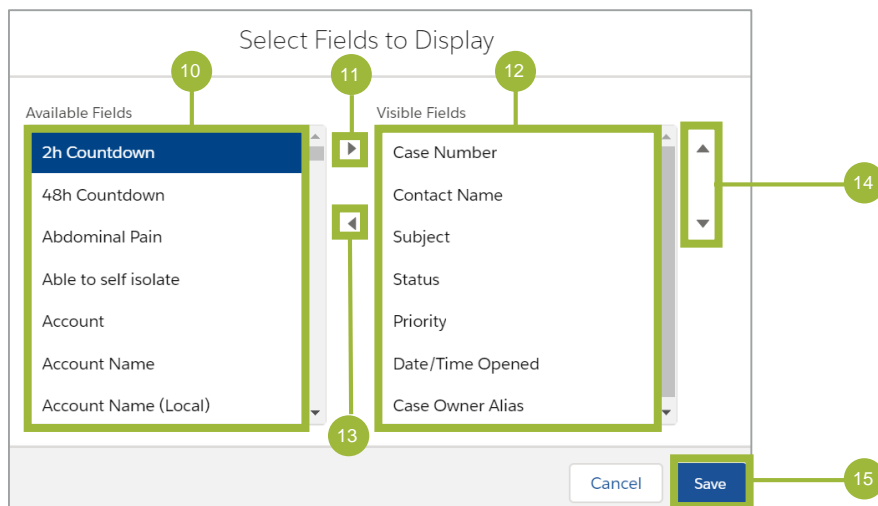
**LIST VIEW CONTROLS**

- New
- Clone
- Rename
- Sharing Settings
- Edit List Filters
- Select Fields to Display
- Delete
- Reset Column Widths

# How to Create New Contact Case List Views

## Create a new / custom contact case list views

10. Scroll to search and select any desired **Available Fields**.
11. Click the **Right Arrow** icon to add the selected field to the new or cloned list view.
12. Scroll to search and select any existing **Visible Fields**.
13. Click the **Left Arrow** icon to remove the selected field from the new or cloned list view.
14. Move a **field** up or down within Visible Fields. This will move the field left or right within the list view columns.
15. Once satisfied, click **Save**.



16. A message appears to indicate you have completed the changes successfully, **List view updated.**



# How to Create New Contact Case List Views

## Create a new / custom contact case list views

You may also add or update existing Filters for the list view.

17. Click the **Filters** button to show filters. Existing filters are displayed.

18. Click any existing filter to edit or view more information.

19. Click the **X** to remove an existing filter, then click **Save**.

20. Click **Add Filter** to create a new filter or **Add Filter Logic** to create filter logic for the new or cloned list view.

The screenshot shows a web application interface for managing contact case list views. At the top, there is a toolbar with icons for star, add, help, settings, notifications, and a user profile. Below this, a search bar is labeled "Search this list...". To the right of the search bar are icons for settings, view type, refresh, edit, and a filter icon (a funnel). A callout line labeled "17" points to the filter icon. Below the search bar is a table with a column header "Date/Time Opened" and a dropdown arrow. The table contains several rows of dates and times, each with a dropdown arrow. To the right of the table is a "Filters" panel. The panel has a title "Filters" and a close button (X). Inside the panel, there is a section "Filter by Owner" with the text "Contact Tracing Outreach Queue". Below this is a section "Matching all of these filters" with a list of filters. One filter is "Status equals Awaiting Outreach". A callout line labeled "18" points to the "Filter by Owner" section. A callout line labeled "19" points to the "X" button next to the "Status equals Awaiting Outreach" filter. At the bottom of the panel are two buttons: "Add Filter" and "Add Filter Logic". A callout line labeled "20" points to the "Add Filter Logic" button. There is also a "Remove All" button at the bottom right of the panel.

# How to Create New Contact Case List Views

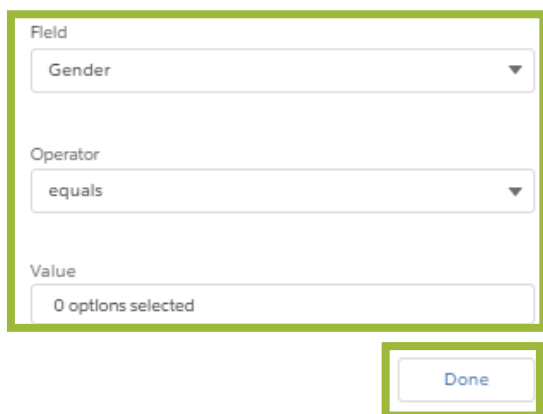
## Create a new / custom contact case list views

21. Upon clicking Add Filter, select the **Field**, **Operator** and **Value**.

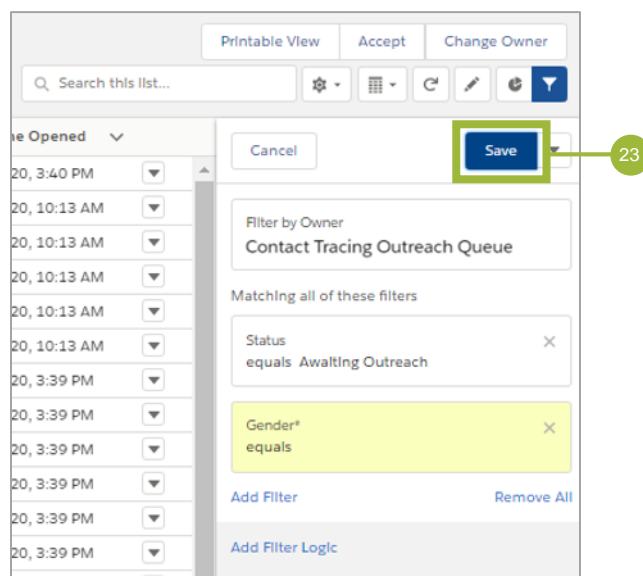
- **Field:** Any field on the contact case may be selected.
- **Operator:** Is the reference between the Field and Value. (e.g. in this example we wish to display all values that equal a specific Gender type).
- **Value:** Includes the specific options available as responses for the Field. (e.g. in this case, for the Field Gender, possible values include Female, Male, Unknown)

22. Click **Done**.

23. Click **Save**.



The screenshot shows a filter configuration dialog with three sections: 'Field' with a dropdown menu showing 'Gender', 'Operator' with a dropdown menu showing 'equals', and 'Value' with a text box showing '0 options selected'. A green box highlights the 'Field' and 'Operator' sections, and a green circle with the number 21 is next to it. A green box highlights the 'Done' button, and a green circle with the number 22 is next to it.



The screenshot shows a contact case list view with a table of cases. The table has columns for 'Case Opened' and 'Status'. The 'Status' column shows 'Awaiting Outreach'. A filter configuration dialog is open, showing the filter configuration for 'Gender' equals 'Awaiting Outreach'. The 'Save' button is highlighted with a green box, and a green circle with the number 23 is next to it.

# Job Aid

How to use Contact Tracing Reports



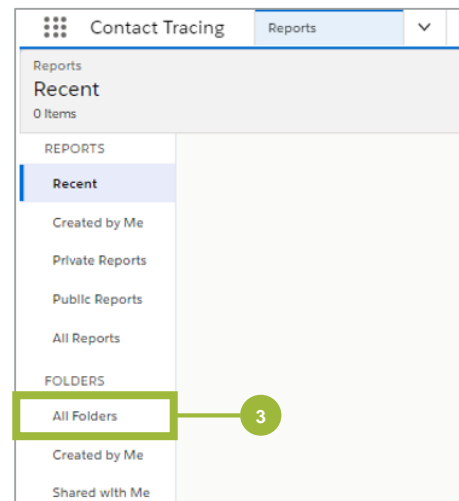
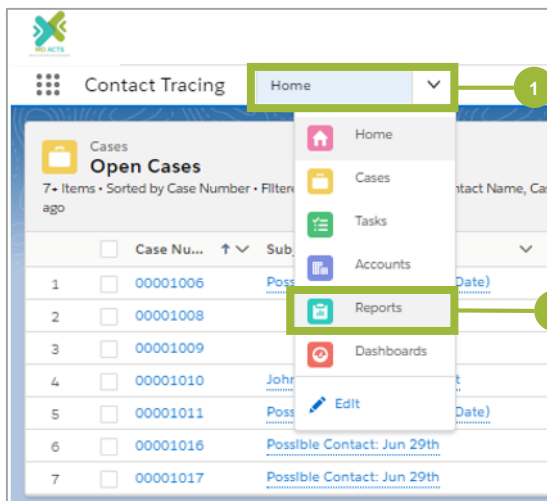
Missouri's Advanced Contact Tracing System

# How to use Contact Tracing Reports

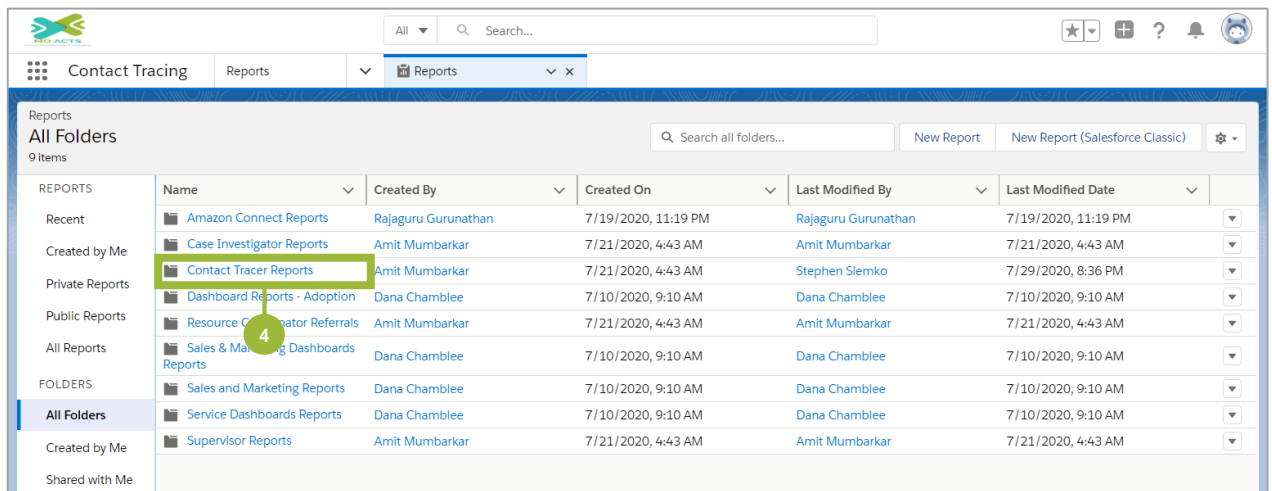
## View contact case reports

**Reports** are lists and summaries that allow you to aggregate and analyze your MO ACTS data in different ways. Reports are customizable, exportable to Microsoft Excel or CSV, and can be private (personal) or public. All MO ACTS users are able to use this reporting functionality and are all able to export reports.

1. Click the **Home** tab.
2. Select **Reports**.
3. Under Folders, select **All Folders**.



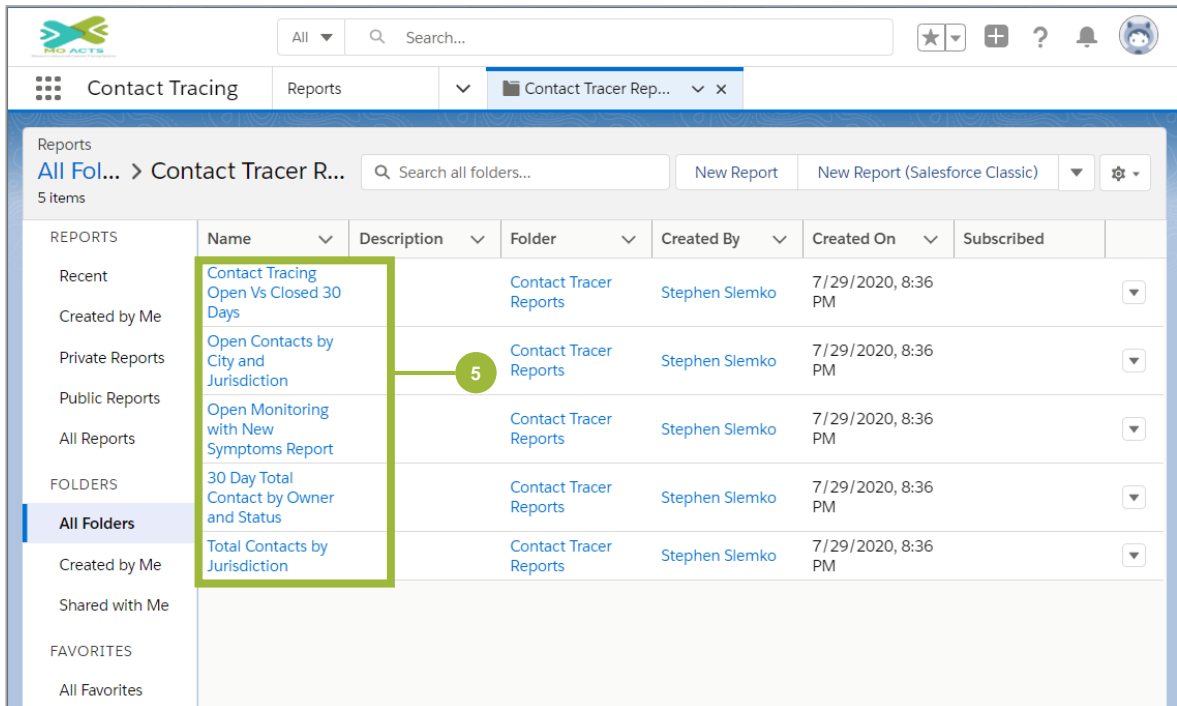
4. Click **Contact Tracer Reports**.



# How to use Contact Tracing Reports

## View contact case reports

5. All existing **Contact Tracer Reports** are displayed.  
Click on a **Report Name** to view the report.



Existing Contact Tracer Reports and their related descriptions:

Report	Description
<b>Contact Tracing Open Vs Closed 30 days</b>	Shows the total number of contact cases created in the last 30 days, split by open and closed status.
<b>Open Contacts by City and Jurisdiction</b>	Shows all open contact cases inside your jurisdiction, grouped by city.
<b>Open Monitoring with New Symptoms Report</b>	Shows all contact cases in the Monitoring status where new symptoms have been reported.
<b>30 Day Total Contact by Owner and Status</b>	Shows all contact cases for your jurisdiction, grouped by case owner and status.
<b>Total Contacts by Jurisdiction</b>	Shows all contacts for your jurisdiction and includes all statuses.

# How to use Contact Tracing Reports

## View contact case reports

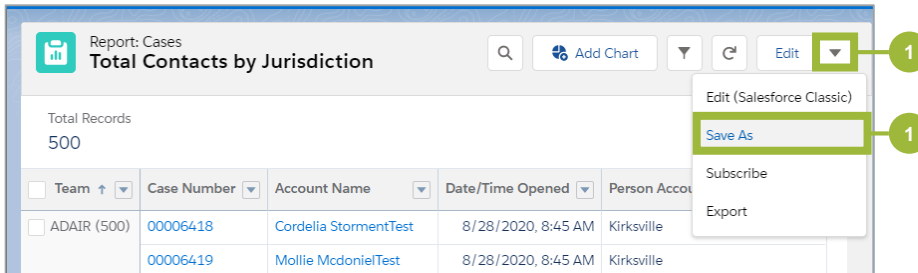
Report	Description
<b>Average Time from Contact Load to Outreach</b>	Shows the average amount of time it takes contact cases to be successfully reached by tracers from the moment they were loaded into MO ACTS.
<b>Average Follow-up during Quarantine/ Contact</b>	Shows the total number of monitoring records entered by contact case as well as the average amount of monitoring records logged.
<b>Number of Contacts Loaded into MO ACTS</b>	Shows all contact cases loaded into MO ACTS with information on the date and time these cases were opened.
<b>Number of Outreaches (day by day)</b>	Shows all contact cases for your jurisdiction, grouped by case owner and status.
<b>Number of Users Actively Using the System</b>	Shows the number of users that have logged in in the last 14 days.



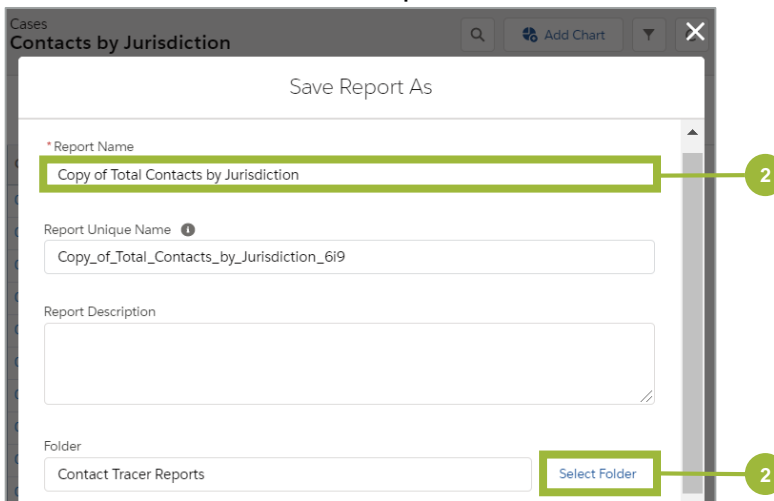
# How to use Contact Tracing Reports

## Create a Personal a report

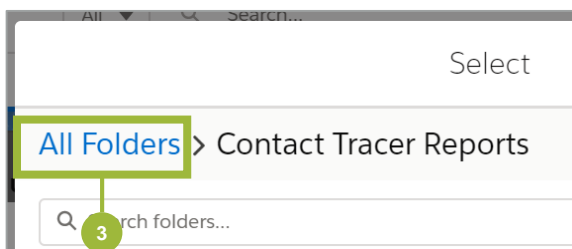
1. From the report you wish to modify, click the drop-down arrow next to **Edit** and select **Save As**.



2. Enter a name for the new report, and then click the **Select Folder** button.



3. Click **All Folders**.



# How to use Contact Tracing Reports

## Create a Personal a report

4. Select **Private Reports** and then click the **Select Folder** button.

The screenshot shows a 'Private Reports' dialog box. On the left, there is a list of folders: 'All Folders', 'Created by Me', 'Shared with Me' (highlighted with a green box and a green circle with the number 4), 'Private Reports', and 'Public Reports'. On the right, there is a large area with a cactus illustration and the text 'Nothing here yet. This folder has no subfolders.' At the bottom right, there are two buttons: 'Cancel' and 'Select Folder' (highlighted with a green box and a green circle with the number 4).

5. Click **Save**.

The screenshot shows a 'Save Report As' dialog box. It contains the following fields: 'Report Name' with the value 'NEW\_Total Contacts by Jurisdiction', 'Report Unique Name' with the value 'Copy\_of\_Total\_Contacts\_by\_Jurisdiction\_619', and 'Report Description' which is empty. Below these fields is a 'Folder' dropdown menu showing 'Private Reports' and a 'Select Folder' button. At the bottom right, there are two buttons: 'Cancel' and 'Save' (highlighted with a green box and a green circle with the number 5).

6. Your new report shows in **Private Reports**.

Reports						
Private Reports						
1 item						
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	NEW_Total Contacts by Jurisdiction		Private Reports	Train39 Test39	8/31/2020, 1:45 PM	
Created by Me						
Private Reports						
Public Reports						

# How to use Contact Tracing Reports

## Modify a Private Report

1. From the private report you would like to modify, click the **Edit** button.

Report: Cases  
**NEW\_Total Contacts by Jurisdiction**

Total Records  
500

Team	Case Number	Account Name	Date/Time Opened	Person Account: Mailing City
ADAIR (500)	00006418	Cordelia StormentTest	8/28/2020, 8:45 AM	Kirksville

2. Use the fields to the left of the report to make your desired modifications.

REPORT  
NEW\_Total Contacts by Jurisdiction

Outline Filters

Groups

GROUP ROWS

Add group...

Team

GROUP COLUMNS

Add group...

Columns

Add column...

Case Number

Account Name

Date/Time Opened

Person Account: Mailing City

E.g., Add another **column** by clicking in the **Add Column** field and selecting the **desired data element**.

3. Click **Save & Run**.

Report Builder

Got Feedback?

Add Chart

Save & Run

Save

Close

Run

4. The updated report displays with data and the changes are saved for future use.

# How to use Contact Tracer Supervisor Reports

## Export existing reports (to excel)

1. Within your selected report, click the **dropdown arrow** next to Edit.

The screenshot shows the Salesforce interface for the 'Cases by Contact Tracer' report. The report displays a table with columns: Case Owner, Status, EpiTrax Case CMR, EpiTrax Contact CMR, Account Name, Relationship to Case, Last Exposure Date, Quarantine End Date, and County. The table contains three rows of data. A green box highlights the 'Export' option in the dropdown menu next to the 'Edit' button. A green circle with the number '1' points to this dropdown menu.

2. Select your preferred **Export View**.

- **Formatted Report:** Exports the report as it appears in MO ACTS
- **Details Only:** Exports only the detail rows, allowing for export to Excel or other systems.

3. If selecting **Details Only**, then select **Format** (xls or csv) and **Encoding**.

4. Click **Export**.

The screenshot shows the 'Export' dialog box. Under 'Export View', the 'Details Only' option is selected. Below this, the 'Format' is set to 'Excel Format .xls' and the 'Encoding' is set to 'ISO-8859-1 (General US & Western Europe)'. A green box highlights the 'Export' button. Green circles with numbers 2, 3, and 4 point to the 'Details Only' option, the 'Format' and 'Encoding' dropdowns, and the 'Export' button respectively.

# Job Aid

Other MO ACTS Functionalities



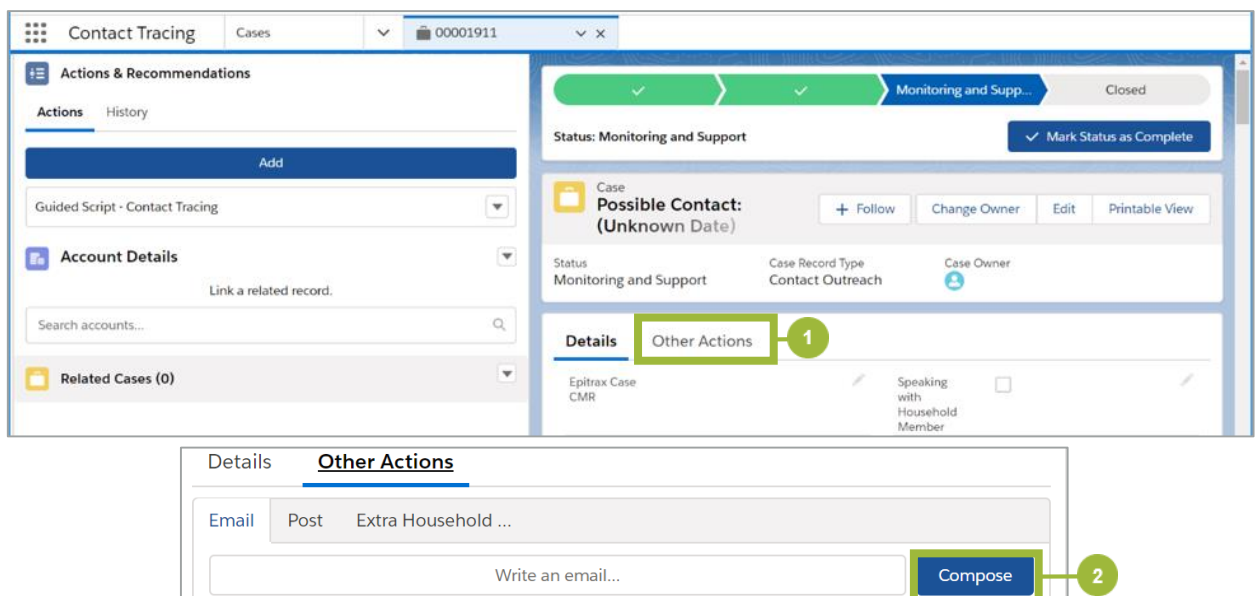
Missouri's Advanced Contact Tracing System

# Other MO ACTS Functionalities

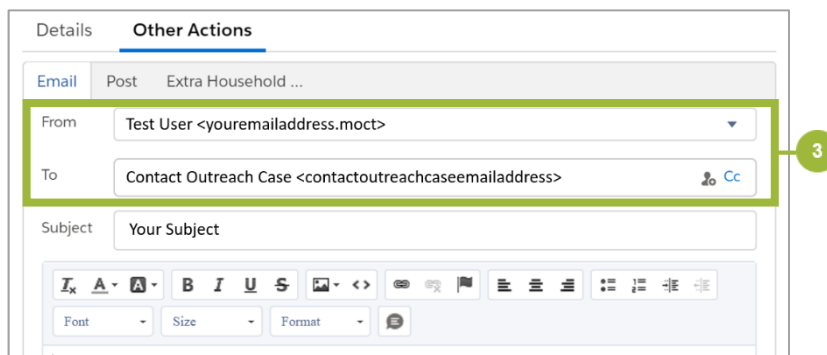
## MO ACTS Email

Users can send an email to a contact after a call has successfully been completed when the Contact Case is in the Outreach Underway or Monitoring and Support statuses.

1. Navigate to the selected Contact Case tab. On the **Details** section, click the **Other Actions** tab.
2. The Email tab will open. Click on the **Compose** button.



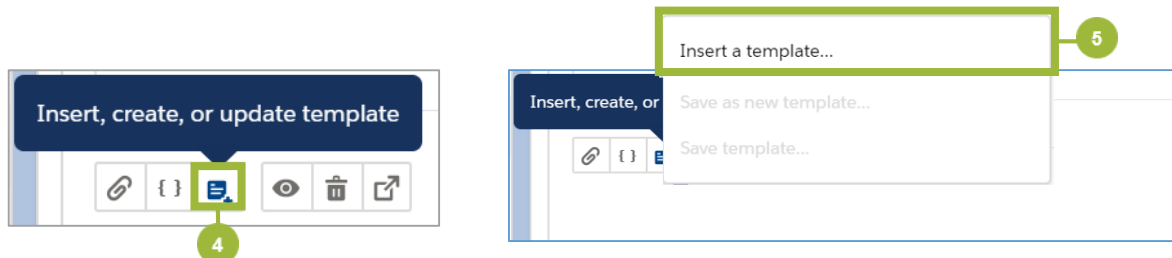
3. The Email window displays. You will see your email address defaulted in the **From** field. Also, the Contact's email address (if provided) will be pre-populated in the **To** field. These fields are editable, if necessary.



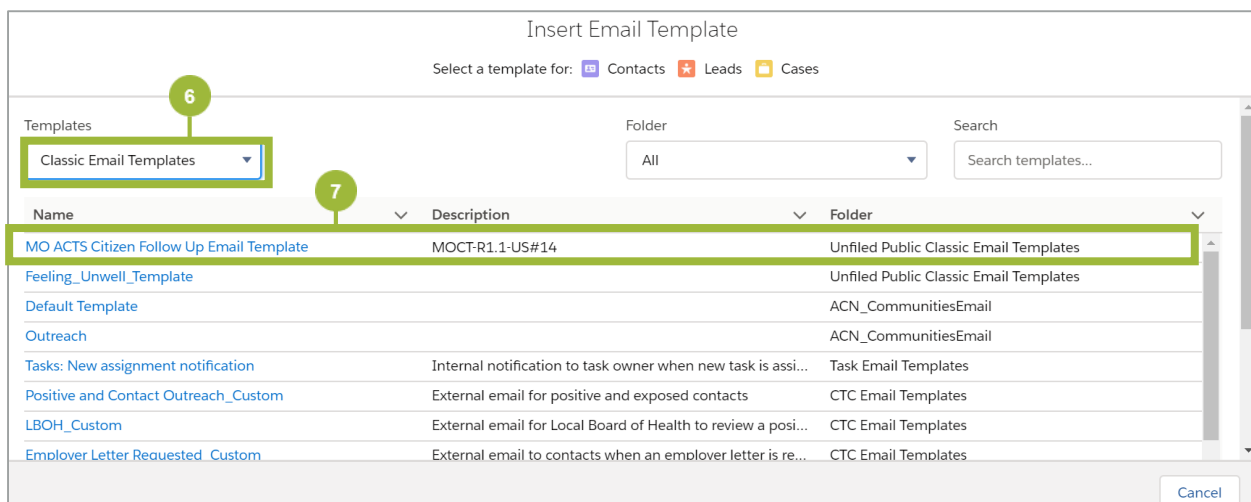
# MO ACTS Email Functionality

## MO ACTS Email

- Before composing your message, scroll down and click on the **Insert, create, or update template** button.
- Click on **Insert a template**.

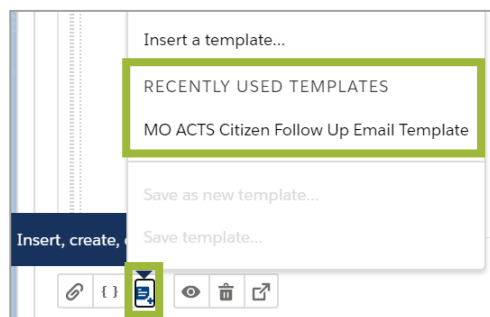


- A new window opens. On the left, select **Classic Email Templates** category from the drop-down.
- Select **MO ACTS Citizen Follow Up Email** template. This will render an email header and footer based on the Case Owner's jurisdiction.



### NOTE:

- Templates vary among jurisdictions so no pre-set body message will display.
- After selecting a template once, it will become available as a **Recently Used Template**. You will find it for later use when clicking on the **Insert, create or update template** icon.







# Inbound Calling and Voicemail Functionality

## Inbound Calling

Contact to a COVID-19 Case is able to call back through the MO ACTS number and Tracers will receive these inbound calls and Contacts can leave voicemails if their call is unanswered. A voicemail will trigger the creation of a missed call task and a notification will be sent to the assigned Contact Tracer. In this section you will learn how the voicemail functionality works in a few key scenarios and how it affects the routing logic for receiving inbound calls.

The Contact to a COVID-19 Case will be calling the existing AWS number for both inbound calling and for SMS call backs (314-696-69920).

When a Contact to a COVID-19 Case calls, the call will follow routing logic based first on the case being associated to a phone number or next through the associated jurisdiction/county. Resulting from this, a missed call task will be created automatically.

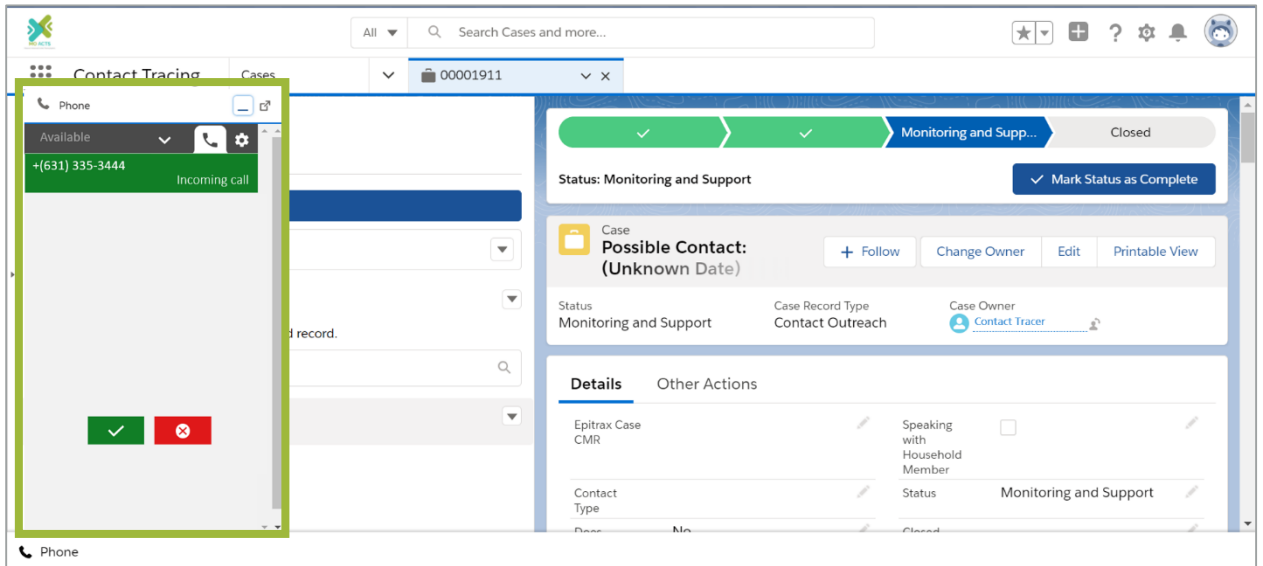
There are three potential scenarios:

- **Scenario A - Phone Number is Associated to a Case and Assigned to a Contact Tracer:** The call will route to the Contact Tracer assigned to the Contact to COVID-19 case and if they are unavailable, a missed call task along with a voicemail will be created automatically and appended to that case. A missed call notification will appear for the Contact Tracer on the notification bell.
- **Scenario B - Phone Number is Associated with a Jurisdiction:** The call will route to the associated LPHA queue. The contact will then hear hold music for 30 seconds and if no Contact Tracer within the LPHA queue is available to answer, the contact can leave a voicemail and a missed call task will be created automatically and appended to that case. A missed call notification will appear for the Account owner on the notification bell.
- **Scenario C - Phone Number has No Associated Jurisdiction:** The Call will route to the Administration queue. The contact will then hear hold music for 30 seconds and if no Contact Tracer within the Administration queue (DHSS) is available to answer, the contact can leave a voicemail and a missed call task will be created automatically and appended to that case. A missed call notification will appear for the Account owner on the notification bell.

# Inbound Calling and Voicemail Functionality

## Inbound Calling

Upon the contact tracer receiving an inbound call, the Contact Tracer's Amazon Connect softphone will automatically pop-up and show a screen similar to the one below if their status is set to available.



### NOTE:



- The phone number of the Contact to a COVID-19 Case of the incoming call will be displayed on top of the Amazon Connect screen.
- You will also find buttons to **Accept** or **Decline** the incoming call.

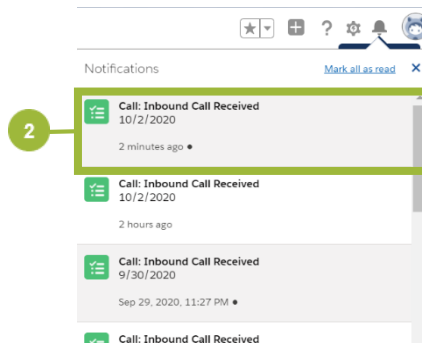
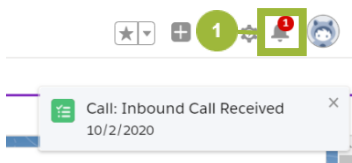
# Inbound Calling and Voicemail Functionality

## Missed Call Notification & Voicemail

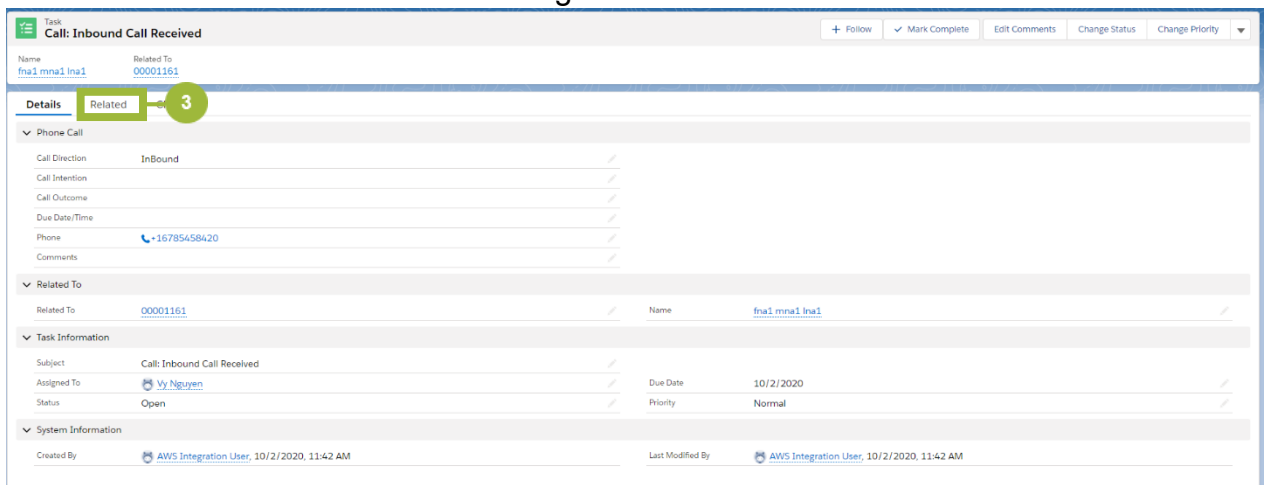
### Contact Tracer: Receiving a Missed Call Notification and Listening to the Voicemail

Below are the steps recognizing when you have missed a call and how to access the missed call task and associated voicemail.

1. From any screen on MO ACTS, a Contact Tracer will be able to see that they have a missed call notification through the Notification Bell at the top right of the MO ACTS screen. You can also check the Today's Tasks section from the Home Screen.
2. When you click the bell, a drop down will appear, showing you that you have a missed call. This notification will be titled Call: Inbound Call Received. Click the notification.



3. Click on the notification. From here, a new window will open showing you the Details tab of the missed call task. Next, click the Related tab. Here you will be able to see the caller's voicemail message if one was left.

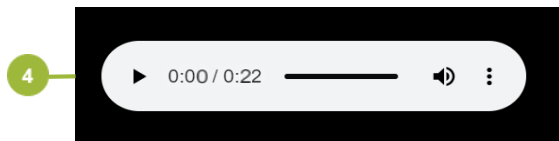
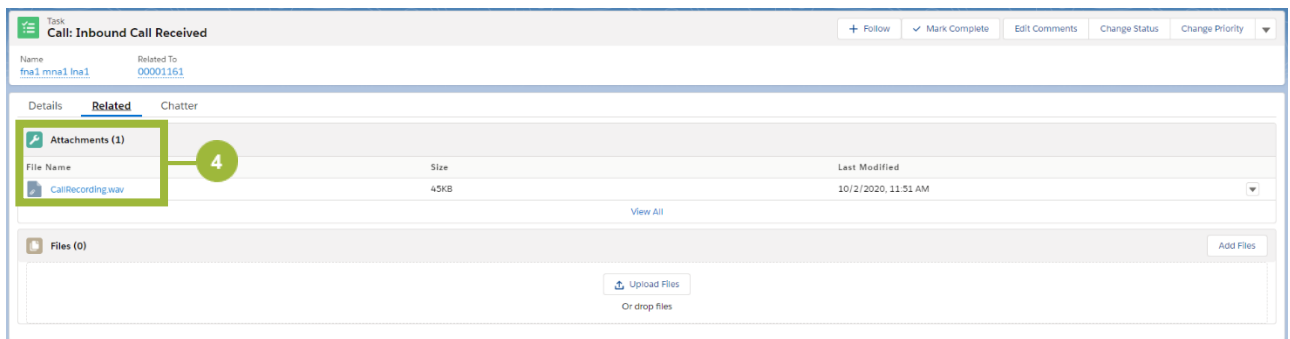


# Inbound Calling and Voicemail Functionality

## Missed Call Notification & Voicemail

### Contact Tracer: Receiving a Missed Call Notification and Listening to the Voicemail

4. Click Attachments to find the link to the voicemail recording. When you click the voicemail, it will open a new window in your internet browser so that you can listen to it.



### Account Owner of an LPHA or Administration Queue: Receiving a Missed Call Notification, Listening to the Voicemail, and Reassigning the Case

When a Contact to a COVID-19 case calls from a phone number that is not yet associated with a Contact Tracer, their call will be routed to either the appropriate queue (jurisdiction or Admin) and if the call goes unanswered, a missed call task will be created and the queue Account owner (jurisdiction or Admin) will receive a notification. The Account Owner can then either act on the missed call or choose to reassign the case to another Contact Tracer. For an Account owner to view the notification and listen to a voicemail, please replicate the steps above. If reassigning the case to a Contact Tracer, please follow the steps below:

# Inbound Calling and Voicemail Functionality

## Missed Call Notification & Voicemail

Account Owner of an LPHA or Administration Queue: Receiving a Missed Call Notification, Listening to the Voicemail, and Reassigning the Case

1. Click Attachments to find the link to the voicemail recording. When you click the voicemail, it will open a new window in your internet browser so that you can listen to it.

Task: Call: Inbound Call Received

Name: fra1 mna1 lna1 Related To: 00001161

+ Follow ✓ Mark Complete Edit Comments Change Status Change Priority

**Details** Related Chatter

▼ Phone Call

Call Direction: InBound

Call Intention:

Call Outcome:

Due Date/Time:

Phone: +16785458420

Comments:

▼ Related To

Related To: 00001161 Name: fra1 mna1 lna1

▼ Task Information

Subject: Call: Inbound Call Received

Assigned To: Ryan Weidinger

Status: Open

Due Date: 10/2/2020

Priority: Normal

▼ System Information

Created By: AWS Integration User, 10/2/2020, 11:42 AM

Last Modified By: AWS Integration User, 10/2/2020, 11:42 AM

2. Click on the pencil icon to edit the **Assigned To** field and search the name of the contact tracer you want to assign the case to.

▼ Task Information

\* Subject: Call: Inbound Call Received

\* Assigned To: Vy Nguyen

\* Status: Open

▼ System Information

Created By: AWS Integration User, 10/2/2020, 11:42 AM

Last Modified By: AWS Integration User, 10/2/2020, 11:42 AM

3. Click **Save**. The case will now be assigned to a Contact Tracer and they will receive a notification stating the Account Owner assigned a case to them.

▼ Task Information

\* Subject: Call: Inbound Call Received

\* Assigned To: Vy Nguyen

\* Status: Completed

\* Priority: Normal

Due Date: 10/2/2020

▼ System Information

Created By: AWS Integration User, 10/2/2020, 11:42 AM

Last Modified By: AWS Integration User, 10/2/2020, 11:42 AM

Cancel Save

# Looking for help?

Contact the MO ACTS Helpdesk with questions:

Telephone: (573) 526-9533

Email: [MOACTS@health.mo.gov](mailto:MOACTS@health.mo.gov)

Hours: 8:00 am – 8:00 pm, Monday - Friday



Missouri's Advanced Contact Tracing System